



# **Pell Team Kick-off Meeting/Working Session**

January 23, 2001



# Welcome

- Introductions



# Service Standards

- Be Worthy of Trust
- Be Courteous
- Deliver Great Products and Services
- Be Efficient



## Goals of the Workshop

- Pilot the new standard training design & development process
- Apply SFA U's new training methodology to Pell training
- Plan the Pell training effort
- Define roles, responsibilities and deliverable timelines
- Utilize standard templates and job aids to outline training design & development activities
- Gather feedback regarding the new training methodology and ease of templates/job aids use



# Agenda

- Introductions
- Explanation of process
- Overview of process
- Plan overview
- Training needs assessment working sessions
- Lunch
- Instructional design plan working session
- Roles and responsibilities
- Closing/Lessons learned

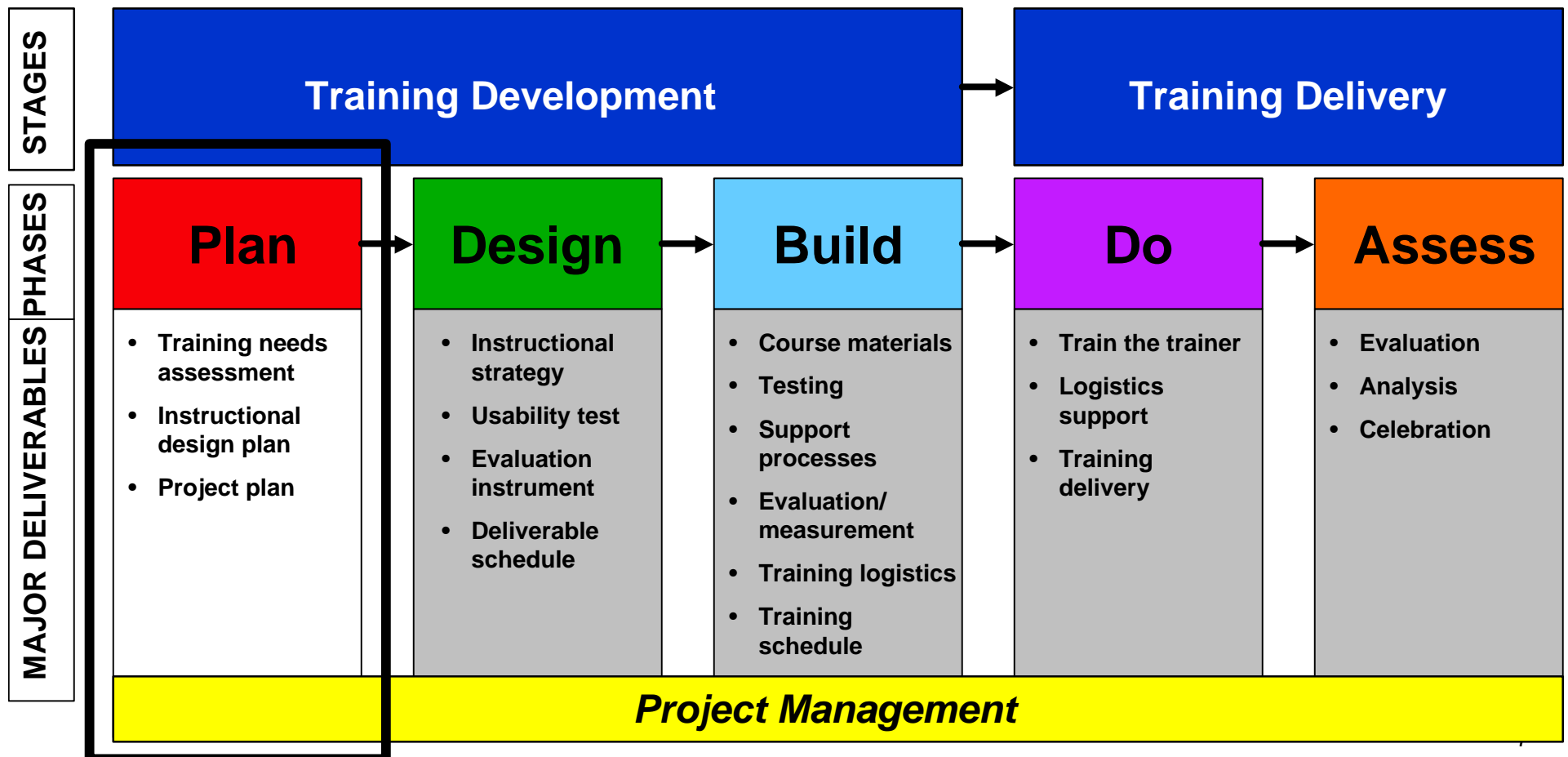


# Training Process Overview Presentation





# Plan overview





# Plan Overview

**Purpose:** Collect information on the audience and determine training requirements. In Design and Build, this information helps developers meet the specific needs of the training audience and manage the scope of the training effort.

**Major Deliverables:** Training Needs Assessment, Instructional Design Plan, and Project Plan.

## **Training needs assessment**

- Audience analysis

## **Instructional design plan**

- Learning objectives
- Content scope
- Delivery strategy
- Logistics strategy

## **Project plan**

- Role map
- Stakeholder analysis
- Workplan
- Task order

## **Project Management**

- Kick off meeting
- Oversee project





# Training Needs Assessment Working Session

- Determine training need and target audience who will receive training
  - Conduct an audience analysis



# Audience Analysis

- An audience analysis identifies audience characteristics to be used as input into the design. It outlines and identifies audience groups and demographic factors to help target training materials to meet the specific needs of the training audience.
- Identifies the following factors:
  - Audience groups
  - Number of people in each group
  - Familiarity with training subject matter
  - Geography
  - School type
  - Delivery constraints



# Audience Analysis Template

Audience Groups	# of People in Each Group	Familiarity with Training Subject Matter	Geography	Audience Characteristics					Delivery Constraints
				School Type					
				4-yr	2-yr	Priv	Pub	Prop	



# Instructional Design Plan Working Session

- An instructional design plan is:
  - An outlined approach to training
  - Based on the needs identified by training needs assessment
- Includes overviews of:
  - Learning objectives
  - Content scope
  - Delivery strategy
  - Logistics strategy



# Learning Objectives

- Learning objectives indicate what tasks participants will be able to achieve after training. Clearly defined objectives provide a sound basis for the selection and development of instructional materials
- The three components of a learning objective:
  - Performance/action
    - What should the participant be able to do?
  - Environment/condition
    - Under what conditions must the participant perform?
  - Measure/criterion
    - How well must the participant perform?



# Learning Objectives Template

Performance/Action	Environment/ Condition	Measure/ Criterion	Learning Objective
What should the participant be able to do? Is the performance observable?	What will the participant have/not have while performing?	How well must the performance be done? Speed? Accuracy? Quality?	<ul style="list-style-type: none"> <li>Related to <b>outcomes</b>, rather than <b>process</b> for achieving those</li> <li><b>Specific</b>, rather than broad</li> <li><b>Measurable</b>, rather than</li> </ul>
<i>Run the 100 yard dash</i>	<i>Dry, level track</i>	<i>Within 14 seconds</i>	<i>Run the 100 yard dash on a dry level track within 14 second</i>



# Role Matrix

- A role map documents and communicates each team member's individual accountability and responsibility to the project team. The role map identifies:
  - Primary individuals necessary to complete a project
  - Responsibilities for each role
  - Relationships among roles
  - Time commitment required for each role to successfully complete the project
- The role map is created early in the project, during the planning phase. It is developed by the team leads (with input from their team and approved by the project sponsor



# Role Matrix Template

	Role	Responsibilities	Time Commitment	Who/How Many
Leadership	Project Sponsor	Set strategic direction		
		Funding control		
		Approve recommendations		
	Project Manager	Oversee project and monitor team work		
		Review/approve recommendations and task order		
Project Team	Team Lead	Establish and support team		
		Assist in planning, designing, building, and assessing		
		Monitor work		
		Review deliverables		
	Development Team	Assist in planning, designing, building, and assessing the training course		
	Instructional Designer	Assist in designing and building the trainer/training materials and help/support processes		
	Trainers	Assist in delivering and assessing the trainer/training materials and help/support processes		





# Review of Day 1

- Overview of training development process
- Overview of plan phase
- Training needs assessment
  - Audience analysis
- Instructional design plan
  - Learning objectives
- Roles and responsibilities



## Preview of Day 2

- Continue instructional design plan working session
  - Content scope
  - Delivery strategy
  - Logistics strategy
- Project plan working session
- Next steps



## Happy Hour Location TBD?

- Capitol City Brewery
- **Capitol Hill**  
**2 Massachusetts Avenue, NE**
- **Directions:**

The Capitol Hill location is located right across the street from Union Station in the historic Postal Square Building. It is a red line Metro stop.





# **Pell Team Kick-off Meeting/Working Session**

January 24, 2001



# Agenda

- Continue instructional design plan working session
- Lunch
- Project plan working session
- Closing/Lessons learned



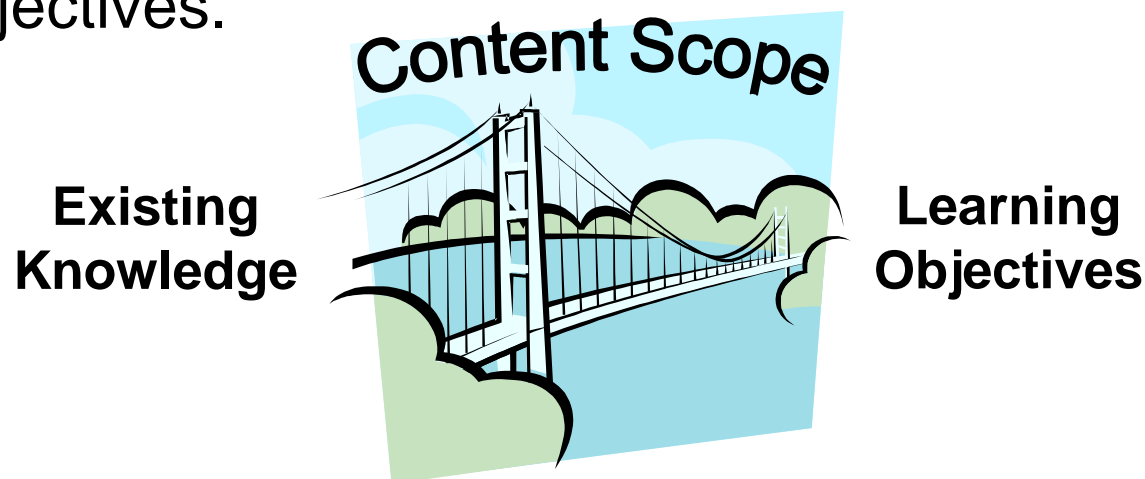
# Continue - Instructional Design Plan Working Session

- An instructional design plan is:
  - An outlined approach to training
  - Based on the needs identified by the training needs assessment
- It includes overviews of:
  - *Learning objectives*
  - Content scope
  - Delivery strategy
  - Logistics strategy



# Content Scope

- The content scope provides a list of topics to be addressed by the training course. These topics bridge the gap between participant's existing knowledge and that which is necessary to achieve the learning objectives.





# Content Scope Template

Learning Objective	Content Categories	Key Concepts
<ul style="list-style-type: none"> <li>Learning objectives indicate what tasks participants will be able to achieve after completing training</li> <li>List the learning objectives for the training course in the boxes below</li> </ul>	<ul style="list-style-type: none"> <li>What are the high-level categories addressed in the learning objective?</li> </ul>	<ul style="list-style-type: none"> <li>What is the <b>new</b> information the participant needs to achieve the learning objective?</li> </ul>
Write a check to the delivery person for the correct amount	Check date Pay to the order of Check amount Signature	Pay to the order of Check amount





# Delivery Strategy

- **What is a delivery strategy?**
  - A delivery strategy is the medium used to deliver training to participants. To be effective, it must be based on sound learning objectives and compatible instructional strategies. The delivery strategy is what the participants “see” and experience, making it the most visible portion of the instructional design.
  - ***Delivery strategy (medium)***
    - Medium by which instruction is presented to participants
    - Examples: classroom, videoconference, computer-based, etc.
  - ***Instructional strategy (method)***
    - Method by which information (content) is organized and sequenced
    - Examples: case study, workshop, lecture, game, etc.
    - \* The instructional strategy is determined during the design phase. However, both strategies must be compatible with one another for an effective learning product. To begin to determine high-level instructional strategies, see attached *Instructional Strategies Job Aid* in the appendix.



# Delivery Strategy Template

Factors	Questions	Delivery Strategy				Appropriate Strategy	Priority
		Classroom	Video Conference	Manual/ Paper-based	Computer-based		
<b>Audience</b>							
<b>Size of audience</b>	<i>How large is the audience?</i>	Small	Large	Large	Large		
<b>Geographic dispersion</b>	<i>Is the audience geographically dispersed?</i>	Centralized	Moderately dispersed	Highly dispersed	Highly dispersed		
<b>Performance</b>							
<b>Complexity of content</b>	<i>What type of content is it? (Awareness, application, or decision-making?)</i>	Awareness, application, decision making	Awareness	Awareness, application	Awareness, application, decision-making		
<b>Task simulation/need to use a system</b>	<i>Is the participant able to practice or simulate the training content?</i>	Yes - learning is active, not passive	No	No	Yes- learning is active, not passive		
<b>Collaborative work tasks</b>	<i>Is the participant able to collaborate with others to perform the training content/tasks?</i>	Yes - material is conceptual and best taught in group format	No hands-on interaction unless being viewed by a group	No - self-paced, lack of interaction	Yes/No depends on type of computer based solution		



# Logistics Strategy

- A logistics strategy is an overview of locations and the number of locations that will be held for a particular training course. Once the number of participants per event is determined, this summary helps to identify the type of support and materials required to complete the training
  - Location of events
  - Type of facility
  - Number of events
  - Number of participants per event
  - Delivery Support
  - Materials needed



# Logistics Strategy template

Location of Events	Type of Facility (If applicable)	Number of Events	Number of Participants per Event	Delivery Support	Materials Needed



# Project Plan Working Session

- The core management plan that includes:
  - *Role map*
  - Stakeholder analysis & communication plan
  - Work plan
    - Tasks, deliverable schedule, draft, review, and final due dates



# Stakeholder Analysis and Communication Plan

- A stakeholder is someone who will affect or be affected by the development and/or delivery of the training. During the planning phase, potential stakeholders, and their level of involvement with the project, are identified. This contributes to the communication plan, created in the design phase.
- The stakeholder analysis identifies:
  - Stakeholders
    - Internal (SFA) and external (schools, contractors, etc) groups who have a stake in the success or failure of the training
  - Interest in the project
    - Awareness, understanding, and/or support
  - Communication needs



# Stakeholder Analysis & Communication Plan Template

Stakeholder	Interest in Project			Communication Needs	Vehicle	Responsible	Sender	Due Dates			
	Interested	Understand	Support					Start	End	Target Dates	Actual Dates
The internal & external groups who will affect or be affected by the development and/or delivery of the training course				What training project information does the stakeholder need or?	How is the communication delivered to the stakeholder?	Who will be responsible to create the communication?	Who will be responsible to deliver the communication? (Maybe same as Responsible)				



# Workplan

- The workplan identifies:
  - Tasks
  - Team member responsible
  - Check-in dates for drafts, reviews and final
  - Comments/status





# Workplan

Task		Responsible	Draft		Review		Final Due		Comments/Status
			Due	Complete	Due	Complete	Due	Complete	
<b>Plan</b>									
<b>Training needs assessment</b>									
	Audience/Performance analysis								
<b>Instructional design plan</b>									
	Learning objectives								
	Content scope								
	Delivery strategy								
	Logistics strategy								
<b>Project plan</b>									
	Role map								
	Stakeholder analysis								
	Workplan								



## Review of Day 2

- Instructional Design Plan Working Session
  - Content Scope
  - Delivery strategy
  - Logistics strategy
- Project Plan Working Session
  - Stakeholder analysis & communications plan
  - Workplan



# Preview of the Design Phase

**Purpose:** Create a detailed structure for the training course. Identify, gather, and structure all necessary information to develop materials during the Build phase.

**Major Deliverables:** Instructional strategy, Usability test, Evaluation instrument, and Deliverable schedule.

## **Instructional strategy**

- Course map
- Content outline
- Activities
- Media requirements
- Training materials standards

## **Usability test**

- Plan usability test
- Conduct usability test

## **Evaluation instrument**

- Plan evaluation/measurement tools & methods

## **Deliverable schedule**

- Implementation timeline
- Logistics timeline

## **Project management**

- Kick-off Meeting
- Create communication plan
- Oversee project



## Next Steps

- Schedule
  - Next gathering / conference call
- Lessons learned